accenture

Memorandum

To: Anne Teresa, SFA

From: Howard Weitzner, Accenture

Date: February 28, 2002

Subject: Deliverable 95.1.1a Training Services Summary

Purpose
This memo summarizes the results of Training Services provided to SFA University during the period February 1 – February 28, 2002. The results were delivered through supporting materials and working sessions with SFA University staff. The work effort addressed improvements to SFA University's training services, processes and systems.

Initiatives this Period
Specific initiatives addressed during this period included:
- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning consultant
- Needs assessment
- Effective teams
- eProject
- Corporate university conference
- University services reorganization
- Leadership information

Planned Initiatives
During the period March 1 – March 31, 2002, the following initiatives may be addressed, but not limited to:
- SFA University strategic planning and organization development
- Training development and delivery methodology/process team
- Delivery cost assessment
- Learning consultant
- Needs assessment
- Effective teams
- Corporate university conference
- University services reorganization

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

Description of Initiatives
SFA University strategic planning and organization development
Underlying several initiatives is ongoing support for SFA University's efforts to develop and enhance its organizational effectiveness. Activities continue to focus on aligning SFA University's activities with the strategic goals of the organization. For example, support is ongoing for partnering with the TDC as well as action team support to help each team complete major segments of work. Next steps may include enhancing the rigor and accountability of action team status reporting and milestones review.

Training development and delivery methodology/process team
The Training Development and Delivery team supports the creation and implementation of best practices for how SFA University develops and delivers training. The methodology (Plan, Design, Build, Do, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team prepared its team scorecard and reviewed the Design phase materials. The team also established a schedule for completing work on subsequent phases, including review sessions with stakeholders, subject matter experts, and advisors. Plan phase materials were further refined, based on recommendations from the Spring 'Tools' and Pell Training teams. The Summer Training team kick-off meeting was organized and facilitated by the Process team. During the 2-day workshop, the team completed all major deliverables of the Plan phase, utilizing the standard templates and job aids. Feedback was gathered to benefit continuous improvement of the process materials.

Specific activities during this period included:
- Refinement of materials for the Plan phase
- Pilot of the Plan phase materials with the Summer Training team
- Facilitation of the Summer Training kick-off meeting
- Continued support of the Pell Training team
- Review and refinement of materials for the Design phase
- Development of pre-Plan materials, such as a training request form and team lead kick-off e-mail

The next phases of work may include:
- Completion and approval of the Design phase deliverables
- Development of evaluation tools and techniques
- Initial development of the Build phase approach and materials
- Support of the Pell Training team during course design process
- Support of Summer Training team during the course planning and design processes
- Initial development of materials for introducing the process to training teams
- Development of the deployment strategy for the training process

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

Delivery cost analysis
The cost analysis team adheres to the SFAU operating model, Plan, Design, Build, Do, and Assess. During February, the team finalized the necessary tasks and next steps to complete the Build phase of the tool by the end of March. This includes finalizing the cost driver definitions, summary reports, and the instructions for data entry. The cost analysis team determined (at a high level) stakeholders to create a communication strategy for the tool. This includes an internal SFAU review, manager demonstration, and general deployment. Additionally, the team will pilot the tool and perform the data analysis for Fiscal Management Training (FMT) in April. The team will develop recommendations and evaluate and/or revise the cost analysis model approach based on these findings.

Activities during this period included:
- Review and revision of the tool
- Formula validation
- Customization and modification of the cost analysis model
- Development of reporting and analysis procedures
- Identify high-level deployment timeline and team next steps

Specific activities in the next period will include:
- Finalize development and customization of the cost analysis model
- Identification and development of communications required to deploy the cost analysis model
- Demonstrate the tool to SFAU staff member and at the manger's meeting
- Prepare to pilot the Fiscal Management Training (FMT) for analysis

Learning Consultant
During this period, the learning consultant model was further defined and developed through conversations with stakeholders and advisors within SFAU. The team also participated in a team scorecard session. The learning consultant serves as the link between SFA University and other areas within SFA. Initially, learning consultants will partner with performance consultants to support scorecard teams. Through this, learning consultants will gain access to teams and develop an understanding of their challenges and needs. To enhance development of this position, the team has commenced a marketing and communication effort to gather input and enhance understanding of its offerings.

During the upcoming period, activities will focus on the marketing of the learning consultant to the organization as well as the identification of core capabilities required to begin offering learning consultant services to the organization.

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

Needs Assessment
In cooperation with the Learning Consultant team, the needs assessment project continued to define its scope. To this end, the team created an overview that presents the purpose, approach, and estimated deployment timeline for needs assessment.
Specific activities in the next phase may include:
- Gathering ideas on needs assessment tools
- Researching existing needs assessment tools/approaches
- Reviewing the needs assessment scope and approach with key SFAU stakeholders

Effective Teams
The "Effective Teams" initiative focused on providing one-on-one facilitation coaching to the SFA U pilot team leads. The team conducted a series of training workshops to build facilitation skills, set goals for performance, and develop a team lead support group to ensure sustainability of the effort. In addition, a series of marketing materials was created to build awareness of the initiative throughout the SFA U community.
Specific activities this period included:
- Provided coaching to team leads on building agendas and facilitating agreement
- Conducted a *Facilitation Workshop* for Team Leads
- Introduced a series of meeting templates and job aids to SFA U
- Developed materials for Effective Team's Champion to present at SFA U All Hands Meeting
- Developed and implemented "Effective Teams Tip of the Week" for SFA U
- Surveyed team members to determine satisfaction with orientation training
- Conducted mini-training sessions on Process, Results, and Relationships to SFA U managers group
- Coordinated Facilitation Leadership course to be conducted by Interaction Associates at the end of February
- Began Effective Teams Phase II development focused on project planning, project management, and building team accountability.

Activities for the next period will include:
- The team will continue to work with the pilot team leads to practice and build their facilitation, agenda planning, and team decision-making skills. As they have begun to enter to the next phase, the team has offered coaching focused on project planning, goal setting, milestone development, and project management.

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

eProject
The Training Process and LMS teams are piloting the use of eProject, a web-based project management and team collaboration site. Using this tool through Mod Partner, team members can access project information, share documents, and collaborate on project status. The tool has been demonstrated to several members of SFA University to assist in their assessment. At the request of SFA University, requirements and pricing may be researched for an eProject site dedicated to SFA University.

Corporate University Conference
A custom developed workshop on Corporate Universities is being planned for delivery to a select group of SFA University managers and staff on March 12 - 13 at the Accenture training facility in St. Charles, IL. The purpose of this conference is to identify, present and apply industry best practices to SFA University. The conference will focus on the following topics:
- Overview of Accenture Corporate University
- Leadership Development
- Curriculum Planning
- Communications and Marketing

University Services Realignment
Support has been provided for the realignment of tasks and personnel within the University Services group in SFA University. By applying a best practice approach for organizational development, the functions within University Services may be realigned to focus the right people on the right tasks. Further support may include capability development, process improvement and reporting relationships.

Leadership Information
Information regarding leadership competencies was researched and provided to assist SFA University establish a leadership curriculum for the organization. Further information and industry best practices will be provided during the corporate university conference on March 12 – 13.

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

Observations/Recommendations

During the period February 1 – February 28, the following observations were identified and will be reviewed to determine the potential impact/value for SFA University:

- On several initiatives, significant time has been dedicated to considering options and preparing presentations to share ideas and gather feedback. Generally, such efforts should now move aggressively to demonstrate progress and results. In some cases, this is the immediate next step; in other cases, this could be done on a parallel track with development of conceptual presentations.
- SFA University would benefit from marketing its services and offerings to the rest of the organization and operating partners. To achieve this, it would be helpful to have a concise listing or brochure that outlines capabilities within SFA University.
- Within SFA University, a process should be established to further encourage accountability. For example, a status reporting procedure would enable employees to report their work and inform managers of progress on different tasks within their respective areas. Once all project information is compiled, this would efficiently communicate status across SFA University. Additionally, status reporting could be structured to enhance follow-through on activities, such as revisiting decisions to confirm their implementation.
- The learning management system (LMS) should be demonstrated at the March SFA University all-hands meeting to communicate the added service SFA University will be providing. Virtual classroom software may be used to allow everyone in the regions to participate in the demonstration.

Subject: Deliverable 95.1.1a Training Services Summary; February 28, 2002

Attachments:
- Training Process Team
    - Updated Plan kick-off presentation
    - Updated Plan phase templates and job aids
    - Summer team workshop agendas
    - Plan workshop evaluation
    - Training Process Team Design phase review session agenda
    - Updated Design phase materials
    - Pell team session lessons learned document
- Cost Analysis
    - Data sheet
    - Summary sheet
    - Reports / graphs
- Learning Consultant
    - Learning Consultant overview presentation
- Needs Assessment
    - Needs Assessment overview presentation
- Effective Teams
    - Team lead orientation evaluation
    - Team lead goal sheet
    - Agenda Template job aid
    - Meeting outcome summary job aid
    - Team lead facilitation workshop training design plan
    - Facilitation quick tips